



BluWave BI- Training Manual



For support please contact: 011 462 6871 or support@bluwave.co.za.

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1. Introduction

BluWave Software now offers each user access to BluWave BI as part of their monthly subscription.

BI (Business Intelligence) can offer users data visualization and easy reporting on the data in their system.

This data visualization can range from graphs, tables, to geo location mapping.

In order to access and set up a BI profile- follow the steps set out in this manual.

2. Accessing BluWave BI

Before accessing the BI platform for the first time, log in to **Bluwave CRM** and click on either **Active Pipeline** or **Sales Performance** options in the **Home** menu. This starts the process of creating a BI profile for the user that is logged in. Please note each user would need to do this.

In order to access **BluWave BI**, type in the following link into the preferred internet browser:

<https://www.bluwavebi.co.za/>



3. Logging into BluWave BI

When logging into BluWave BI for the first time, the user will be required to change their password to a more secure password.

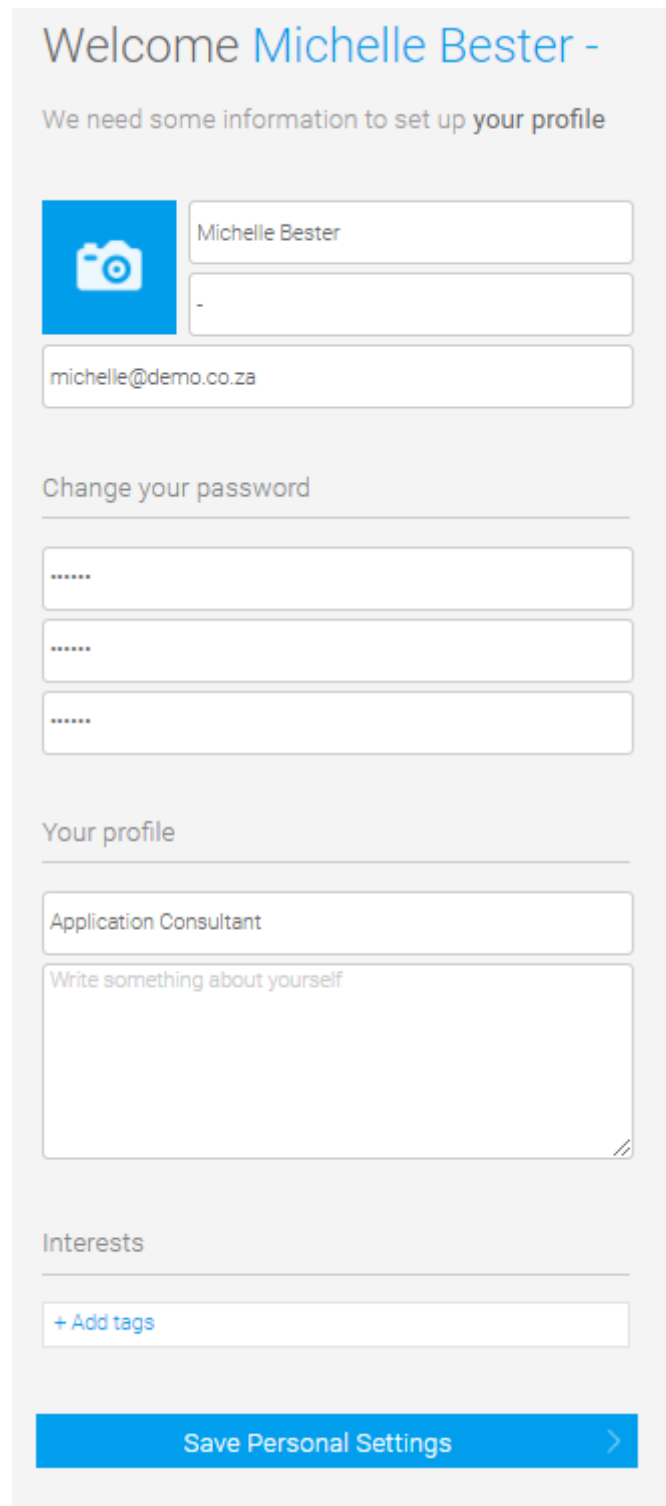
The default info:

Username: The user's email address

Password: 123456


The user would enter this default information into the Username and Password field and click on the **Login** button to proceed to the next screen.

Username: Password:



Welcome Michelle Bester -

We need some information to set up your profile

 Michelle Bester

-

michelle@demo.co.za

Change your password

.....

.....

.....

Your profile

Application Consultant

Write something about yourself

Interests

+ Add tags

Save Personal Settings >

On this screen the user will fill in their:

- Current password: 123456
- New Password (twice)- Please ensure to choose a password that is secure and contains various different characters, numbers and upper or lower case characters.
- Designation

And then click on the **Save Personal Settings** button to save these details.

4. Adding a Dashboard to the My Dashboards page

Once logged into **BluWave BI**, it would allow the user to add an existing dashboard to their **My Dashboards** page.

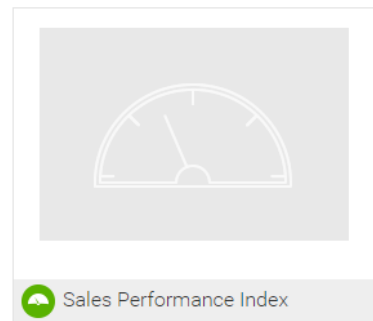
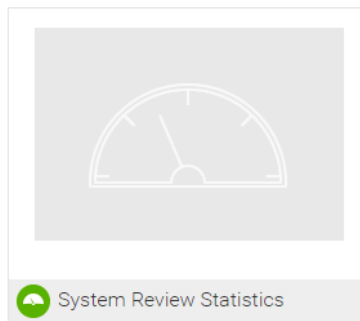
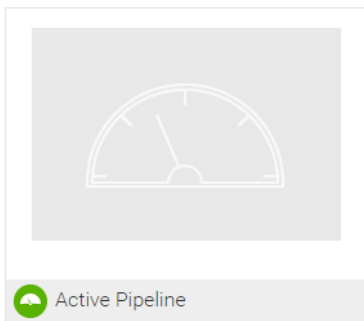
Initially it would allow the user to choose one dashboard, by double clicking on it, but multiple dashboards can be added to the **My Dashboards** page for quick access.

4.1 Choosing the first dashboard to add to the My Dashboards page

The user can just double click on any of the available dashboard to add it to the **My Dashboards** page.

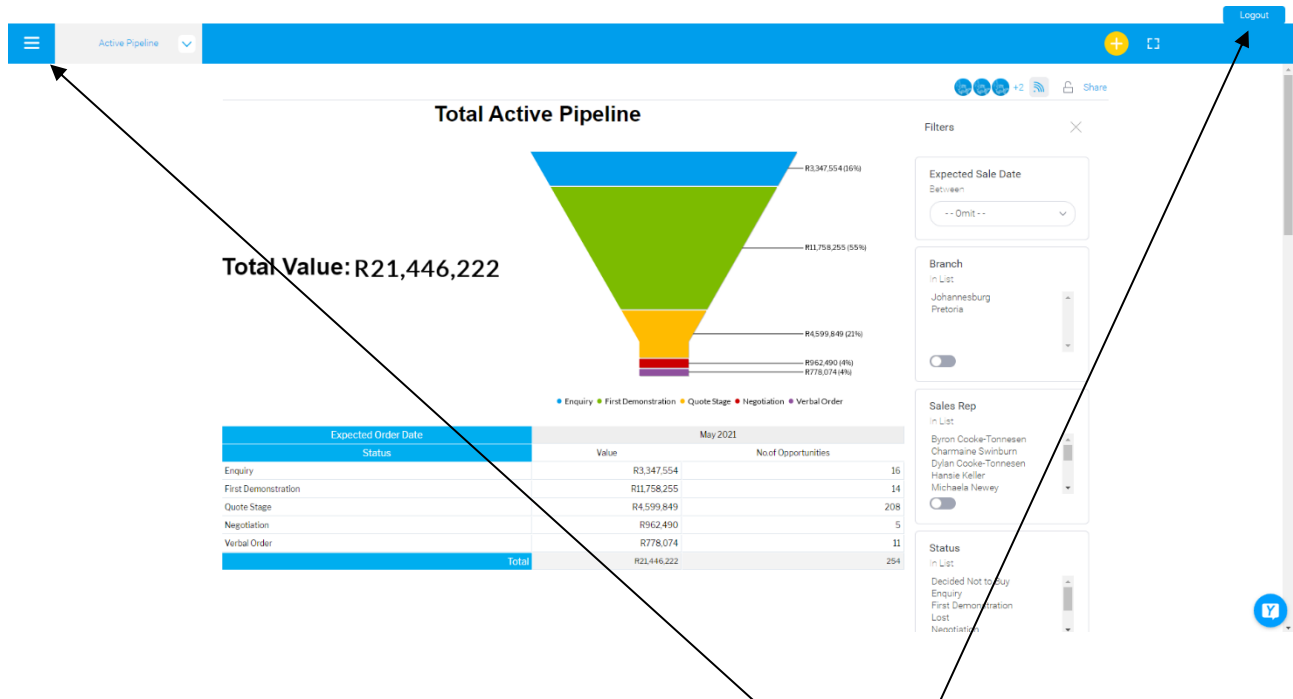


You do not have any tabs on your dashboard, here are some that you may find useful. You can use the [browse page](#) to search for other tabs to add to your dashboard.



[Browse More](#)

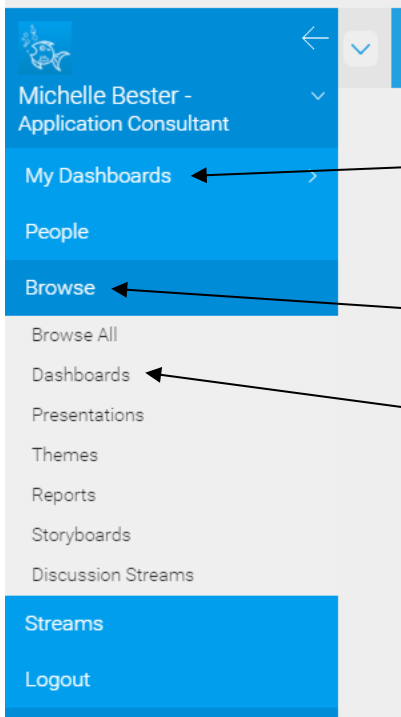
Below is an example where the **Active Pipeline** dashboard has been added to the **My Dashboards** page.



On this **My Dashboards** page the user can easily access the **Menu** and the **Logout** button.

4.2 Adding additional dashboards to the My Dashboards page

Once the first dashboard has been added to the **My Dashboards** page, additional **Dashboards** can be added, by click on the **Main Menu** button at the top left-hand corner of the page.

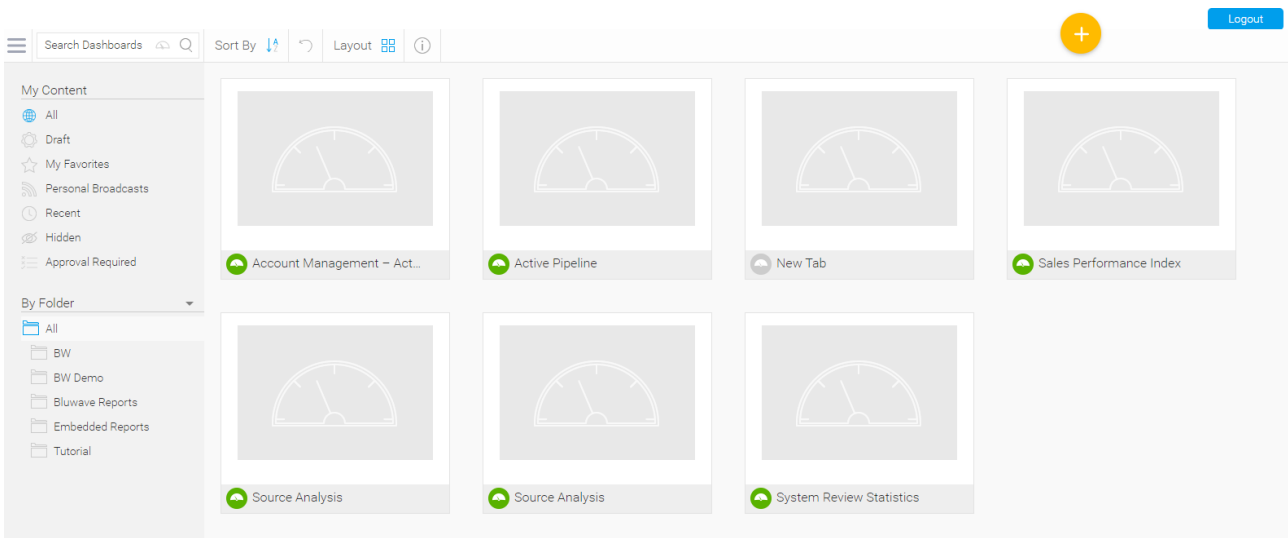


This **Main Menu** allows the user to move around and access different sections of the **BluWave BI** system.

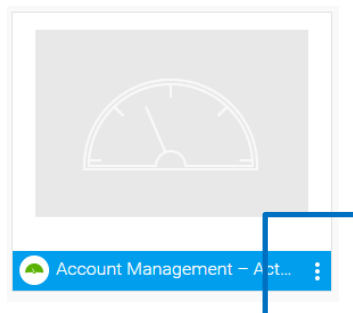
Clicking on the **My Dashboards** option will return the user to the first page of the system where the added **Dashboards** can be accessed easily.

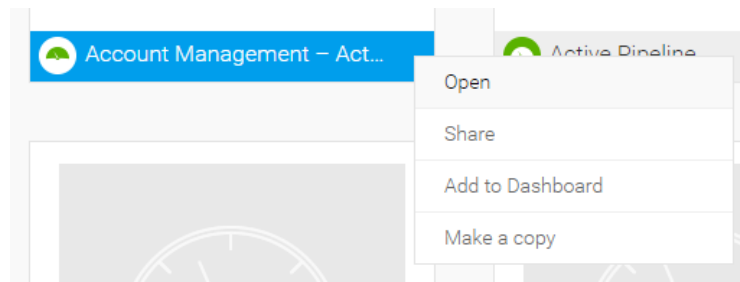
Once the **Main Menu** is expanded the user can click on the **Browse** option to expand another list of options to choose from.

Clicking on the **Dashboards** option will take the user to another page with all the available dashboards loaded on **BluWave BI**.



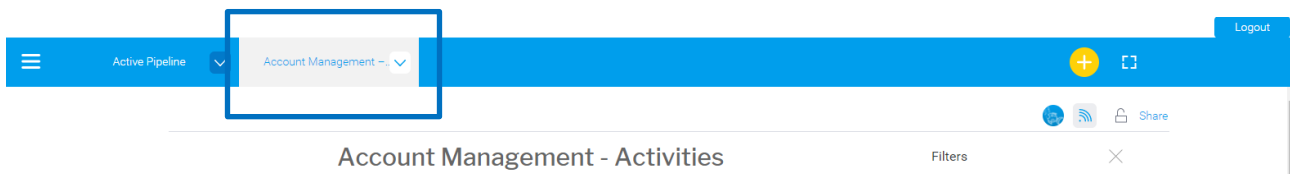
Hovering with the cursor over the bottom right-hand corner one of the dashboards will reveal **3 Dots**. Clicking on the **3 Dots** shows another **Menu** to choose from.





The **Menu** allows the user to **Open, Share, Add to Dashboard** or **Make a Copy** of the dashboard.

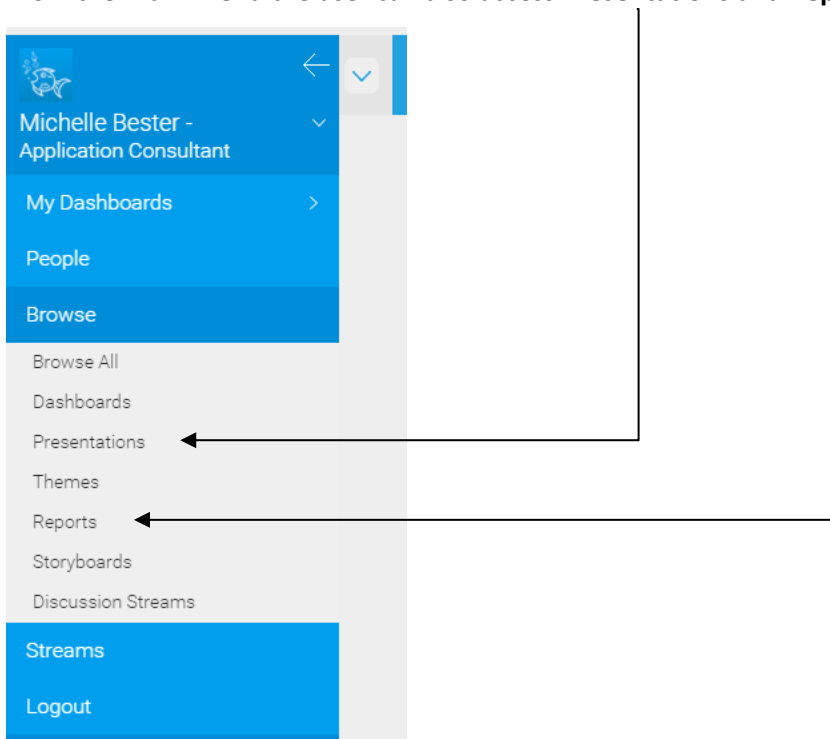
Click on the **Add to Dashboard** option to add this dashboard to the **My Dashboards** page.



When the user returns to the **My Dashboard** page the newly added dashboard will be visible at the top of the page to click on.

5. Other Available Functions

From the **Main Menu** the user can also access **Presentations** and **Reports** on BluWave BI.



6. Sharing the BluWave BI Content

Here is what the different share options mean

Option	Description
Distribute	Allows the user to share the dashboard on another user's Timeline.
Email	Allows the user to send the dashboard to another user via a one-off email.
Embed	Allows the user to embed the dashboard into an HTML, wiki, or blog page.
Link	Allows the user to share a link to the dashboard.

Sharing the content on **BluWave BI** can easily be achieved by finding the **Share** link on the relevant page.

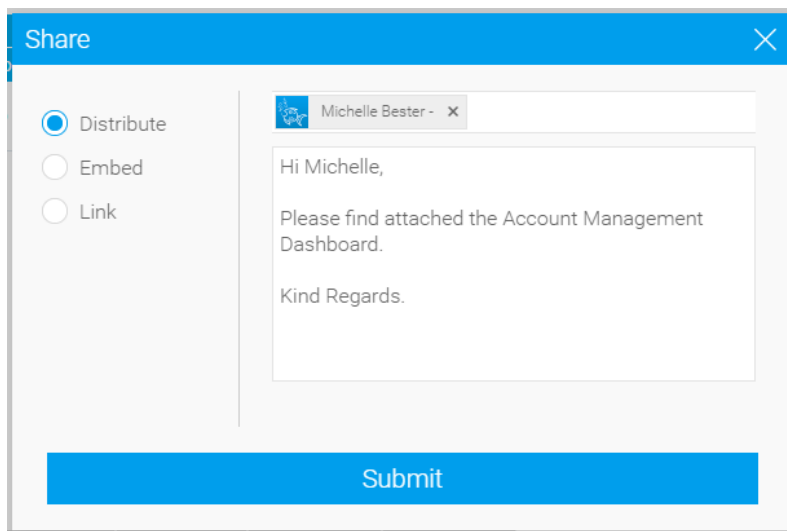
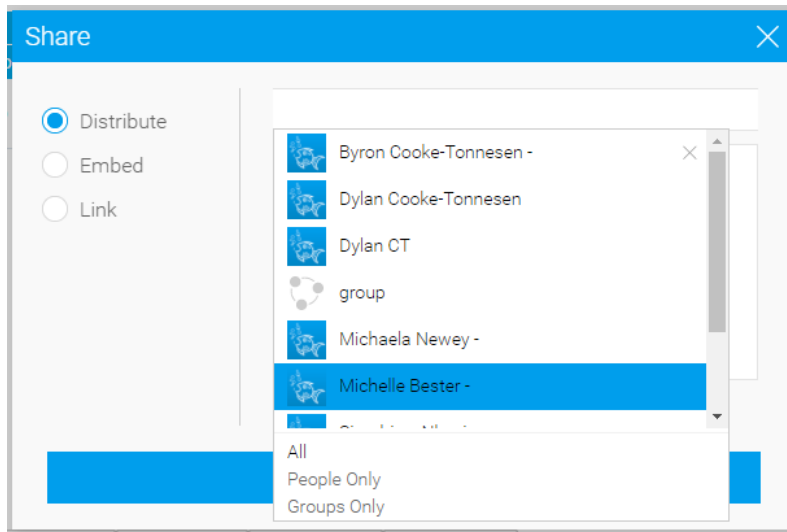
The screenshot shows the BluWave BI interface. At the top right, there is a blue navigation bar with a 'Logout' button. Below it, a 'Share' icon (a square with a plus sign) is visible. An arrow points from the 'Share' icon in the screenshot above to the 'Share' icon in this screenshot. The main content area displays 'Account Management - Activities' with a table of completed activities and filters on the right.

Completed Activities			
Company	Customer Type	Activity Type	Date
Verdant	Gold (10k - 50k)	Email	03-May (Mon) 1
		Telephonic	1

Clicking on the **Share** link will bring up a dialogue box that allows the user to either **Distribute**, **Embed** or **Link** the chosen content.

The 'Share' dialog box is shown with three radio button options: 'Distribute' (selected), 'Embed', and 'Link'. To the right, there is a text input field for 'Add Recipients' and a larger text area for 'Additional Message (Optional)'. A blue 'Submit' button is at the bottom.

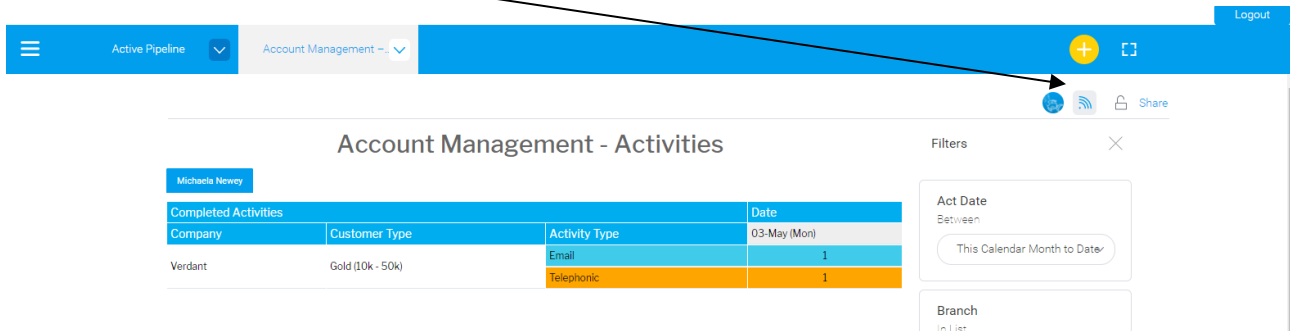
While on the **Distribute** option, it will allow the user to select a recipient from a list of users, when clicking on the **Add Recipients** field.



Click on the **Submit** button to send the **Dashboard** in PDF format to the selected recipients.

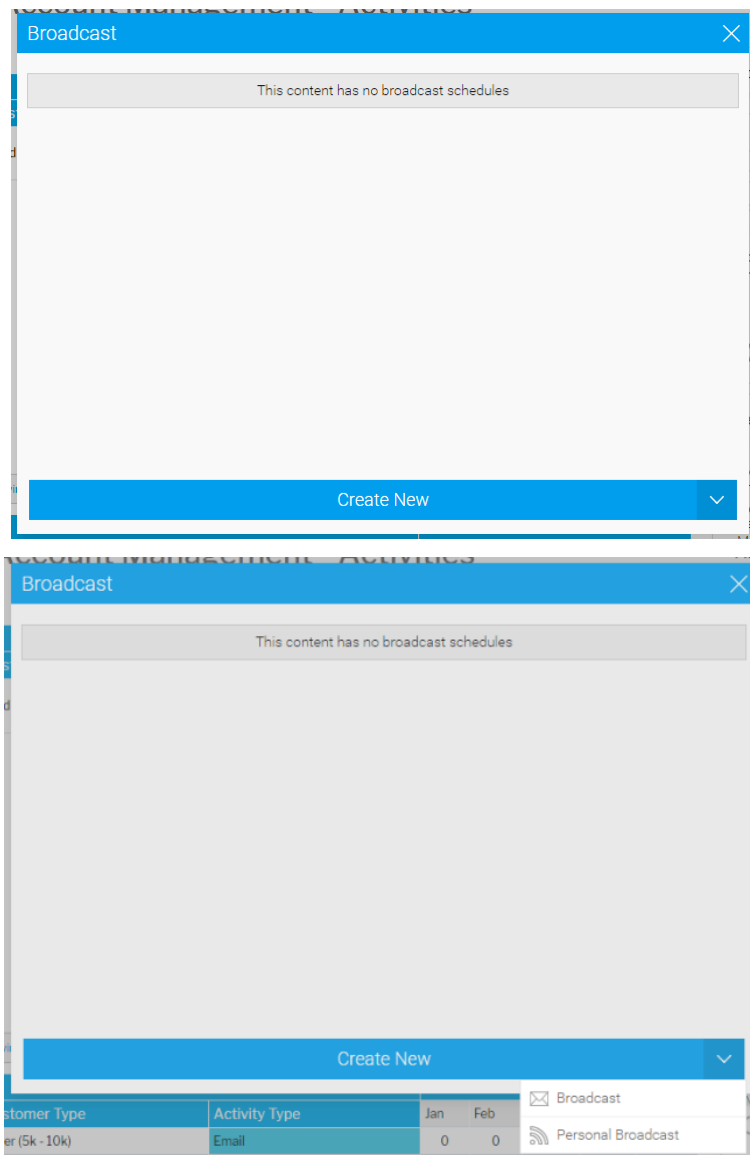
7. Broadcasting the BluWave BI Content

Broadcast schedules can be set up to send the desired content to a specific user at specific times.



7.1 Adding a Broadcast Schedule

Once the user has clicked on the **Broadcast** button, the **Broadcast** dialogue box will appear.



Clicking on the **Create New** button will reveal two options to choose from:

- **Broadcast**- Allows the user to schedule a broadcast for themselves and other users.
- **Personal Broadcast**- Allows the user to schedule a broadcast for themselves only.

7.2 Broadcast

The screenshot shows a dialog box titled "Broadcast: Account Management – Activities". At the top, there is a tab for "Michelle Bester" and a button for "Add Recipients". Below this is a text input field containing "Account Management Dashboard Broadcast". The main body of the dialog contains a message: "Hi, Please find attached the Account Management Dashboard." Below the message are two checkboxes: "Append Broadcast Date" (checked) and "Secure PDF" (checked). There are icons for attaching a file and a link. Below these is a dropdown menu for "PDF password source" with the text "Set up a password for this broadcast." and a "PDF Password" input field. Underneath is a section for "User Prompt Filters" with a dropdown menu set to "Current Filter Values" and the text "What filter values would you like to use for the broadcast?". The "Frequency" section shows "This will run every week, on Sunday." with dropdown menus for "Weekly" and "Sunday". A link for "Advanced settings" is visible. At the bottom is a large blue "Submit" button.

On this dialogue box the user can:

- Select the Recipients who should receive this broadcast.
- Add a Subject line for the email. [Please see the next heading for a guide to our recommendation for this field- this will ensure easy recognition to updating the broadcast in the future.](#)
- Add a Message to the body of the email. [Please see the next heading for a guide to our recommendation for this field- this will ensure easy recognition to updating the broadcast in the future.](#)
- Choose if the Broadcast date should be appended or if it should be a secure pdf.
 - If the Secure PDF checkbox is ticked- the user can add a password to open the PDF.
- Add User Prompt Filters- this allows the user to choose what filters to apply to the content before broadcasting the content.
- Select the Frequency at which the broadcast should be sent.
- Adjust the Advanced Settings:
 - Allows for a specific time to be set
 - Schedules the broadcast for a limited period
 - Notifications if the broadcast failed.

Click on the **Submit** button to save this setup.

7.3 BluWave Recommendation to the Subject and Email Body of the Broadcast

We recommend the following to help you recognise broadcast when there are many that have been set up as well update broadcasts when you might not know what the original settings would have been set to.

Just replace the blue coloured text to the relevant info on the broadcast.

7.3.1 Subject Line

{Report/ Dash Name}- {When: i/e Daily/ Weekly/ Monthly} - for {Staff}

This is so that we can easily identify the broadcasts for editing purposes.

7.3.2 Email Body

Good Day,

Please find attached the following report broadcasted to you: {Report/Dashboard}

This report is subject to the following filters as well as the access rights applied to your BluWave user profile:

Branch(es): JHB

Staff: All

Date Range: This Business Week

Broadcast Info:

Type: Report/ Dashboard/ Presentation (Custom/ Public)

Frequency: Weekly, Friday, 9pm (Africa +02:00)

This report runs from an automated system, please do not reply to this email.

Should you have any queries please contact your system administrator or send us an email to support@bluwave.co.za.

Kind Regards

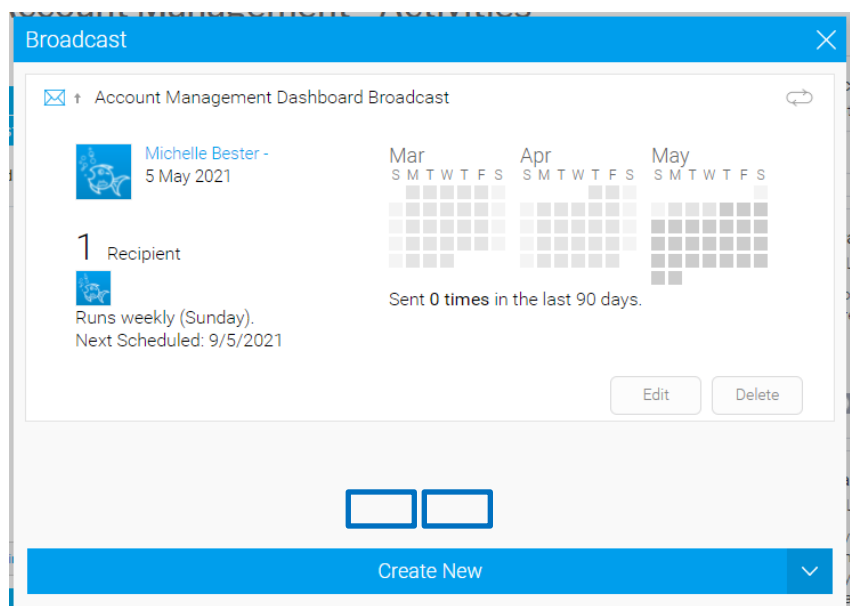
BluWave BI

7.4 Personal Broadcast

Clicking on this option from the Broadcast dialogue box, will prompt similar info as explained in the 7.1 Broadcast heading above.

7.5 Editing an existing Broadcast Schedule

When returning to the first Broadcast dialogue box, the user can click on the existing schedules (which will expand) and either **Edit** or **Delete** the existing schedules.



8. Viewing a Dashboard

When viewing a dashboard, the user will have the ability to:

- Set data filters.
- Open a report.
- Access additional options.
- Drill down on the content to more detail

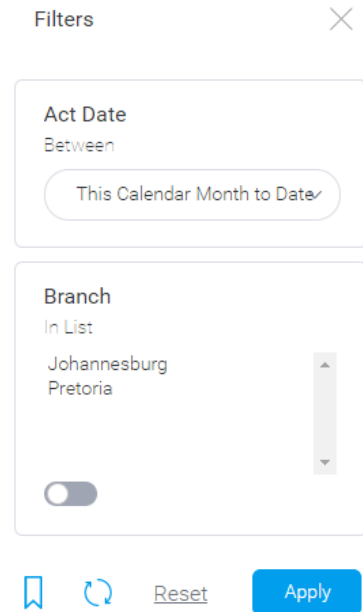
8.1 Setting Data Filters

On the right-hand side of each dashboard there will be filters that can be set to change the data that is viewed on the dashboard.

Examples of these filters are:

- That date period of the data
- The Branch
- The Sales Staff
- Customer/ Prospect Types
- Etc.

Once the filter changes have been applied, click on the **Apply** button at the bottom, alternatively click on the **Reset** link to view the original Dashboard data.



8.2 Opening a Report

Hovering with cursor over the content in the dashboard will reveal additional options to the user, such as **3 dots** (which implies an additional menu options) and an **Open Report** option.

Clicking on the **Open Report** option will take the user to the original report used to compile the dashboard content.

Account Management - Activities

Michaela Newey

Completed Activities			Date
Company	Customer Type	Activity Type	03-May (Mon)
Verdant	Gold (10k - 50k)	Email	1
		Telephonic	1

Filters

Open Report

Act Dat
Between

This

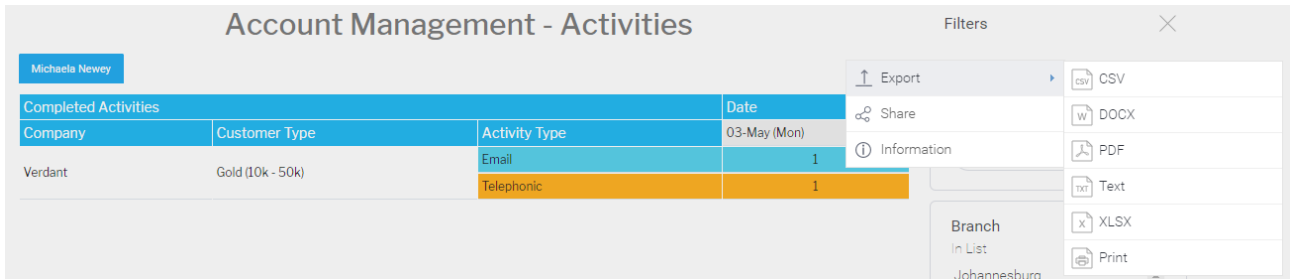
... [Open Report]

8.3 Additional Options

As seen in the previous heading, each portion of a dashboard has additional options that can be accessed by hovering over the content, at the top right hand corner, with cursor and clicking on the **3 dots**.

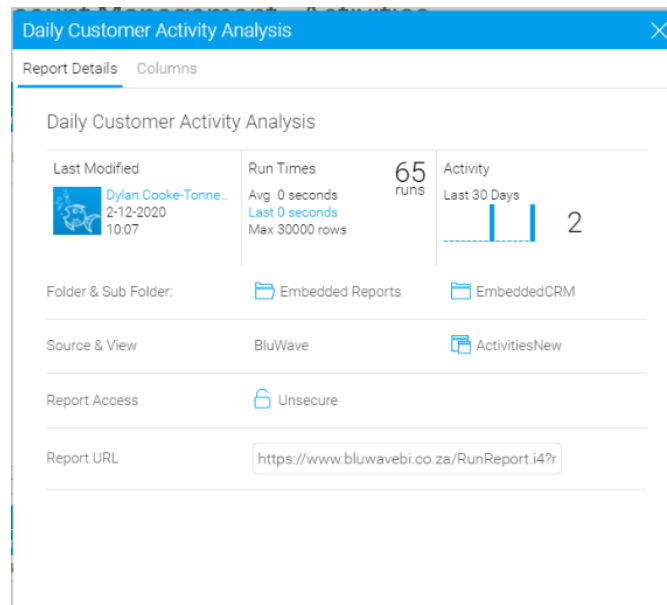
The **3 Dots** reveal an additional menu with an **Export**, **Share** and **Information** option.

The **Export** option allows the use to download the content in various formats.



The **Share** option allows the user to share the content with recipients. Follow the steps explained below heading 6.

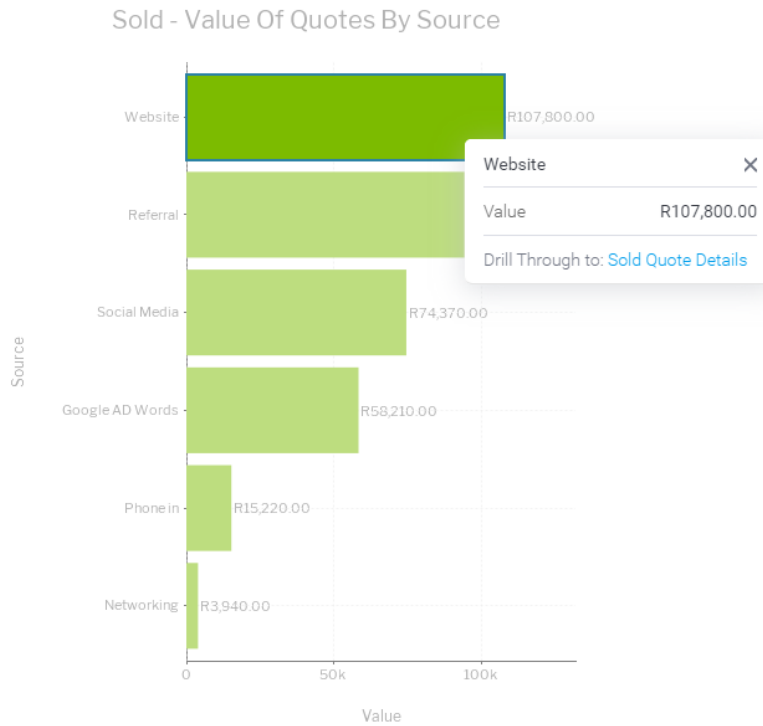
The Information option offers additional information regarding the relevant content:



8.4 Drilling Down on the Content

Some of the content of the dashboards will allow the user to hover over the content, which will show additional info with an additional option to drill down to a more details report.

*Click on a source for a detailed report.



Clicking on the content will take the client to another page with more detail.

Sold Quote Details

Quote No	Company	Opportunity Name	Value	Source	Sales Staff
1291	Vodacom	Commercial Printers	R90,000.00	Website	Michelle Bester
1309-1	DIY	Paper	R13,300.00	Website	Sunelia Snyders
1323	Bubba Gump Shrimp	Vinyl Items	R4,500.00	Website	Michaela Newey

9. Revision History

Version	Date	Updates
SM0043	05.05.2021	<ul style="list-style-type: none">• Creation
SM0043.1	06.05.2024	<ul style="list-style-type: none">• Added the different sharing options• Added the recommendation for broadcasts subjects and email body